

This article relates to the following four project option tabs available on the admin side of a form:



### **General List Options**



Tickets per page: The number of tickets to be displayed in the list of issues. The default is 20.

Ticket colours: Tickets are usually highlighted in a specific colour, based on the status.

However, it is possible to configure issues to be highlighted in an alternative colour based on a more specific condition.

For example, you may have a field in the form, which allows users to select a priority level, e.g. High, Medium, Low. In this case, even if the status of an issue is set to 'Pending' and the colour for the 'Pending status' is orange, you may like to highlight it in red if the priority level is set to 'High'. This essentially allows you to implement a 'RAG' (Red, Amber, Green) system within the list view.

For set-up steps and more examples, see our guide here.

Ticket age: Choose whether a ticket's age-related to its time from creation, or from the last modification.

The option chosen will appear on the front end of tickets, as shown below.

InfoCapture / Bug Tracker / View Bug: HD0038	Ticket / Jump	Swite	ch to Bug Tracker		~	ж
Common Download ticket in PDF format		+ Sub	omit Bug 🔳 🔟	Ľ	٥	۳
ID HD0038	Submitted by	Claromentis Administrator				
Status Pending Reporter Feedback	Assigned					
Date of report 13-06-2023 11:55	Last modified	13-06-2023 11:56				
Created 2 days ago						
SLA						
III View Bug	<b>₩</b> All					
Bug Details			Please provide a			tion
InfoCapture / BugTracker / View Bug: HD0038	Ticket # Jump	Switc	ch to Bug Tracker		~	ж
C Download ticket in PDF format		+ Subi	imit Bug 🔳 💷	Ľ	٥	۳.
ID HD0038	Submitted by	Claromentis Administrator				
Status Pending Reporter Feedback	Assigned					
Date of report 13-06-2023 11:55	Last modified	13-06-2023 11:56				
SLA	Ticket last modified	2 days ago				
/ III View Bug → Flow Chart 💭 Notes 📑 Files 🕢 History Ô History diagram	<b>∗</b> All					
Bug Details			Please provide a as possible, inclu			tion

#### Primary Field: The primary field can be used in the Open Items component.

The selection made in the primary field on the admin side of a form is what will pull through when 'primary field' has been included in the component:

Project options	Genera	al list options				
Project Summary	Set how	tickets will be d	isplayed in the list view			
<ul> <li>Edit project</li> <li>roperties</li> </ul>	Condit	tion Set is met. A		nen viewing the list of submissions, as well Ild' can be defined. This is a single field wit		
<ul> <li>Project permissions</li> </ul>						
Statuses	Ti	ckets per page	20			
Conditions		Ticket colours	Add new ticket colour			
Field condition sets			Each line should contain true, the first in the list v Condition syntax: field_s		et will be shown in the specified	colour. If more than one conditio
/I Triggers				symbolic name, field_value - field value		
Behaviour						
		Ticket age	Age from creation	~		
🕏 Field visibility	. г	Ticket age Primary field	Age from creation Priority	~		
R Field visibility	C	-		~		
		-	Priority	~		
SLA		-	Priority	v V		
] SLA		-	Priority	v v		
SLA	Summ	Primary field	Priority Save	Reporter	Created	Modified
SLA Automatic changes Open items	Summ	Primary field	Priority Save	Reporter     Claromentis Administrator	Created 05-06-2023 13:06	Modified 15-06-2023 16:30
SLA Automatic changes Open items ID Form	Summ er Urgent	Primary field	Priority Save			
SLA Automatic changes Open items ID Form HD34 Bug Track	er Urgent Low	ary State : (100)	Priority Save	Claromentis Administrator	05-06-2023 13:06	15-06-2023 16:30
SLA Automatic changes Open iterrity ID Porm HD34 Bug Track HD35 Bug Track	er Urgent er Low er Norma	Primary field	Priority Save	Claromentis Administrator Claromentis Administrator	05-06-2023 13:06 05-06-2023 14:13	15-06-2023 16:30 15-06-2023 16:30

**Tickets List Columns** 

Project options	Tickets list columns			
Project Summary	Choose which column headings should b	e displayed when viewing the list of submitted ticke	ets.	
<ul> <li>Edit project</li> <li>properties</li> </ul>	Name	•	Add	
<ul> <li>Project permissions</li> </ul>	Field name	Symbolic name	Туре	Hide
Statuses	ID, Comments, Files		-	fixed
Conditions	= SUBMITTER	_reporter_		0
Field condition sets	= Department	department	Select	0
	= Ticket Type	ticket_type	Radio	0
M Triggers	= Urgency	urgency	Radio	0
Behaviour	= Ticket Summary	ticket_summary	Long string	0
R Field visibility	= ASSIGNED TO	_assigned_		0
🗄 SLA	= STATUS	_status_		0
U SLA	= DATE CREATED	_created_		0

It is possible to define which fields should act as sortable column headers in the list of issues.

The ID of the ticket, the number of notes added to the ticket and the number of files attached to the ticket are always displayed in the list and are in a fixed position.

It is possible to include/exclude the following as column headers:

- Submitter
- Assigned To (if handlers are being used)
- Status (if statuses are being used)
- Date created
- Date last modified

In addition, all of the fields within your form can be chosen to be included/excluded as column headers.

How this appears on the front end in the ticket list, so customise this based on what you need end users to see here:

	_				Ticket						
ID -		0	Submitted	Department	Туре	Urgency	Ticket Summary	Assigned to	Status	Created	
ST0023			Anne Wilkins	Human Resources	Question	Medium	Who is currently in charge of running this report?		Submitted	18-02-2019 11:46	
ST0022	1		Connor Chapman	Human Resources	Request	Medium	New user account	Dan Butler	Resolved, Awaiting Confirmation	17-08-2015 11:31	
ST0021			Vanessa Wright	Sales	Question	Low	How do I upload a document?		Submitted	17-08-2015 11:31	
ST0020			Jason Reid	Marketing	Problem	High	Unable to download images	Charles Johnston	Pending Further Info	17-08-2015 11:31	
ST0019			Stephanie Hunter	Human Resources	Problem	High	Emails are not working	Dan Butler	Resolved, Awaiting Confirmation	17-08-2015 11:30	
ST0018			John Vance	Finance	Request	Medium	Increase file upload limit	Charles Johnston	Pending Further Info	17-08-2015 11:30	

# Searchable Fields

Project options	Searchable fields Choose which information users can filter	by when using the Advanced Search from the list of submitted ticke	ts.	
<ul> <li>Edit project</li> <li>properties</li> </ul>	Add field	Time spent •	bb	
<ul> <li>Project permissions</li> </ul>	Filter display	Two columns		
Statuses	Field name	Symbolic name	Туре	Hide
Conditions	= DATE CREATED	_created_		0
Field condition sets	= DATE LAST MODIFIED	_last_modified_		0
7 Triggers	= SUBMITTER	_reporter_		0
Behaviour	= ASSIGNED TO	_assigned_		0
	= STATUS	_status_		0
Field visibility	= TRAFFIC LIGHT	_traffic_light_		0
🗄 SLA	= Department	department	Select	0
🛠 Automatic changes	= Ticket Type	ticket_type	Radio	0
Ir Workflow	= Urgency	urgency	Radio	0

It is possible to define which fields should act as filters in the list of issues. The following can be included/excluded as filters:

- Submitter
- Assigned To (if handlers are being used)

- Status (if statuses are being used)
- Traffic light (if SLAs are being used)
- Date created
- Date last modified

In addition, all of the select fields within your form, i.e. checkboxes, radio buttons and select fields, can be chosen to be included/excluded as filters.

Below shows how a user can access the advanced search area on the front end of a form and use the filters to perform a search:



## **Default Search Filter**

It is possible to configure a default search filter for the list of tickets.

If a default search filter set is defined, the list of issues will be pre-filtered accordingly for all users.

This can be changed by form administrators at any time from the admin side.

Project Summary Choose a predefined filter for any user viewing the list of submitted tickets.	Project options	D. C. Harris I. Char					
Fetty project   Project permissions   Created   Free   Statues   Conditions   Field condition sets   Triggers   AssiGNED TO   Field vabibility   Status   Status   Caromentis Administrator   Mititations   Status   Caromentis Administrator   Mititations   Versions   Status   Caromentis Administrator   Mititations   Versions   Caromentis Administrator   Submitted by   Impedit   Caromentis Administrator   Status   S		Default search filter	iowing the list of subm	itted tickets			
Project parmissions   Project parmissions   Created   Field condition sets   Canditions   Submitted by   Imyelf 1   Imyelf 1   Imyelf 1   Imyelf 1   Charles Johnston   Behaviour   Statuss   Status	r Project Summary	choose a preventied ricer for any user v	rewing the tist of subin	inted uckets.			
		For example, you may wish for users	o only see tickets with	a status of 'New' and 'Awa	iting Approv	ral', but not those with a status of 'Closed'.	
Statuses   Statuses   Conditions   Statuses   Statuses   Statuses   Field condition sets   Tiggers   ASSIGNED TO   Behaviour   Statuses   Statuses <td><ul> <li>Project permissions</li> </ul></td> <td>Created</td> <td>From</td> <td></td> <td>То</td> <td></td> <td></td>	<ul> <li>Project permissions</li> </ul>	Created	From		То		
Field condition sets   Ingers   ASSIGNED TO   Imyed1   Caroments Administrator   Pield visibility   Stat   Stat   Stat   Vorkflow   Vorkflow   Vorkflow   Vorkflow   Vorkflow   Vorkflow   Vorkflow   Statis   Department   Imyed1   Imperson	Statuses	Last modified	From		То		
Claroments Administrator   M Tiggers ASSIGNED TO   Behaviour Imyed1 Um	Conditions	Submitted by	[ myself ]				
ASSIGNED TO ASSIGN	Field condition sets			inistrator			
Serial void   3. Field visibility   3. Field visibility   3. Field visibility   3. Field visibility   3. Statu   4. Automatic changes   5. Obtaint notification   5. Obtaint notifications   6. Takkets list columns   6. Takkets list columns   7. Takkets list columns   7. Takkets list columns   8. Obtaint search fitter   7. Takkets list columns   8. Obtaint search fitter   7. Takkets list columns   8. Obtaint search fitter   8. Takkets list columns   9. Obtaint search fitter   9. Takkets list columns   9. Takkets list columns   9. Obtaint search fitter   9. Takkets list columns   9. Obtaint search fitter   9. Takkets list columns   9. Takkets list columns   9. Obtaint search fitter   9. Takkets list columns   9. Takkets list columns   9. Obtaint search fitter   9. Takkets list columns   9. Obtaint search fitter   9. Obtaint search fitter   9. Takkets list columns   9. Obtaint search fitter		ASSIGNED TO			1		
SLA   SLA   K Automatic changes   K Automatic changes   Vorkifow   TRAFFIC LIGHT   Workifoation   K Notification   K Notification   Department   Multiman Resources   Multiman Resources <tr< td=""><td></td><td></td><td>Charles Johnston</td><td></td><td></td><td></td><td></td></tr<>			Charles Johnston				
k Automatic changes		Status					
P Worktow     Within SLA       Notification     Rescuber Time Breached Awaiang Confirmation       So Notifications     Department       So Default notification fields     Impair Prance Human Resources       So General List options     Ticket Type       General List options     Ticket Type       So General List options     Urgency       Catched List columns     Urgency       Control     By default sort by Marketing       Default search filter     By default sort by Customisation       Thank you" page     Sorting direction			In Progress	nfo			
Nutification   So Nutifications   Default nutification   So Default nutification   So Default nutification   So General List options   Tickets Jist columns   Casearchable fields   So Default search fitter   Customisation   Sorting direction   Thank your page	Workflow	TRAFFIC LIGHT			1		
Befault notification     Bepartment     Image Surves       Ist options     Ticket Type     Image Surves       General list options     Ticket Type     Image Surves       Tickets list columns     Urgency     Poblem       Question     Request     Image Surves       Bofault search filter     By default sort by     ID       Customisation     Sorting direction     Descending       * "Thank you" page     Sorting direction     Descending	Notification				1		
Storing direction   Human Resources   Marketing   Marketing   Marketing   Marketing   Marketing   Marketing   Poblem   Question	Notifications	Department			1		
			Human Resources				
General List options     Question Request       Tickets list columns     Urgency       Q Searchable fields     Imp       Default search filter     By default sort by       Customisation     Sorting direction       Image: Part of the search filter     Descending	ist options	Ticket Type			÷		
Urgency     Imy]       Q. Searchable fields     Imy]       3 Default search filter     High       Customisation     By default sort by       ID     V       Thank you" page     Sorting direction       Swee     Reset	General list options		Question				
Q. Searchable fields     High Medium       3 Default search filter     D       Customisation     By default sort by            Thank you" page      Sorting direction	Tickets list columns	Urgency					
Customisation By default sort by ID ~ "Thank you" page Sorting direction Descending ~ Sorte Reset	2 Searchable fields		High				
Customisation  Thank you" page  Sorting direction  Descending  Sorting Reset	Default search filter	By default cort by	ID				
	Customisation				_		
Custom messages Save Reset	🕼 "Thank you" page	Sorting direction			~		
	Custom messages		Save Reset				

An example of where this may be useful is if you have a 'Closed' status.

By default, you may wish to exclude issues which are set to 'Closed'.

End users can clear the default search filter in the ticket list, whereby all issues they have permission to view will then be returned.

The default search filter area just allows administrators to control what users first see when opening the ticket list, to best optimise it for their work needs or the majority.

As shown below, the default view for this project is not to exclude 'Closed' status as set by an administrator on the admin side of the form.

This means on the front end when a user accesses the form, it will show only tickets in all other statuses by default.

The user can of course change the view using the advanced search if they so wish.



# Recommended next article: Custom messages

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